



Site Sales Admin System

Solicitor Training Manual

Version 2
Thursday, 27 February 2014

Background

As one of Persimmon's nominated Solicitors you play an important part in the sales process of each of our homes. This document explains the steps required of you to ensure that the process is as quick and efficient as it can be for both parties.

The URL is <https://crm.persimmonhomes.com/Solicitors/SignIn> and you will require a password.

Procedure for existing Solicitors

When you log in, you will need to select the 'Account' tab and create a password. If you forget your password, you can click 'Forgotten Password' and a new password will be sent to you.

Procedure for new Solicitors

When new Solicitors are added to the system an e-mail is generated and sent with a password and login details.

Data Protection

SAS is a securely hosted, powerful online system that contains the contact details of existing prospects. The password must conform to data protection best practice, so please do not leave login details and passwords in the office.

Reservation Agreement by Email



Reservation Agreement

Page 1 of 2

Mr Test test test
2 Blackthorn Avenue
Tiverton
EX16 6TY
United Kingdom

Sarah Scriven (Regional Administrator)
Persimmon Homes Anglia
Persimmon House
Colville Road Works
Oulton Broad, NR33 9QS

Tel: 01502 516784
sarah.scriven@persimmonhomes.com

Tuesday 25th February 2014

Dear Mr test

Thank you for reserving your new Persimmon home. Your reservation agreement is detailed below and your payment will now be processed.

1

Plot No. 276 - Becket's Grove

t - 01953 602 142, e - becketsgrove.angl@persimmonhomes.com

Property Address 8 Harvey Close Wymondham Norfolk NR18 0WH	Estimated Build Date Mar 15 - Apr 15	Release Price £243,950	Purchase Price £235,666
House Type 4 Bed Detached House	House Type Name N/A	Gross Area (sq ft) TBC	
Tenure Freehold	Parking Spaces 0	Garage None	Garage Tenure N/A
Ground Rent N/A	Service Charge N/A	Garage Ground Rent N/A	Garage Service Charge N/A

2

Sales Schemes Part Exchange	Incentives N/A
Property Address 2 Blackthorn Avenue Tiverton EX16 6TY	Promo Code N/A
	Agreed Price TBC

Reservation Fee Paid:	£250
Non-Refundable:	£99
Reservation Date:	31/01/2014
Reservation Expiry:	17/03/2014
Payment Type:	Card

When a customer Reserves you will receive an email of the Reservation form shown above. The customers' details will also appear in the Reservations tab on your Dashboard.

1

Plot Details and Customer Information.

2

If a Sales Scheme is selected (e.g. Help to Buy), it will be shown here.

Dashboard Overview - Reservations

PERSIMMON Solicitor Admin System

Logged in as: Karen Castle | [Logout](#)

Dashboard **Account**

Tasks: You have **25** overdue actions.

Reservations

Show below are your reservations. Use the search panel to filter and click on the **Edit** link next to them to view and update.

Reservations

First Name **Surname**

Region **Development**

Plot **Year** **Week**

Overdue Actions **Show All in Company**

[Clear](#) [Search](#)

Your Results

Show: 1 - 6 of 6 results

Instructed	Lead Name	Brand	Region	Development	Plot (Price)	Mortgage	Next Action	
31/01/14	Mr Philip Lock	P	Designamite 1	Designamite 1 Prospect	002 (£175,000)		Issue contract papers	Edit
15/01/14	Mr Pablo Castle	P	Designamite 1	Designamite Persimmon	121A (£145,000)		Issue contract papers	Edit
15/01/14	Castle	P	Designamite 1	Designamite Persimmon	111 (£145,000)		Receive contract papers	Edit
15/01/14	Mrs Karen Test	P	Designamite 1	Designamite Persimmon	124 (£155,555)		Receive mortgage incentive	Edit
15/01/14	Mrs Karen Castleton	P	Designamite 1	Designamite Persimmon	002 (£213,124)		Issue contract papers	Edit
15/01/14	Mrs Karen Castle	P	Designamite 1	Designamite Persimmon	332a (£150,000)		Receive contract papers	Edit

Once logged in, the Dashboard is where you manage Reservations.

- 1 Your name is displayed in the top right corner. You can Logout from here.
- 2 Tasks - these are your tasks, including overdue actions. Click the links to view details.
- 3 Reservations tab - this contains all the Reservations sent for your attention.
- 4 Filter by Name, Region, Development, Plot, Date or Action.
- 5 Show all in Company - by default, only Reservations linked to your login are shown. You can view all Reservations linked to your Company by selecting 'Yes' in the drop down.
- 6 Reservations are displayed in date order (most recent first). Overdue actions are shown in red.
- 7 Select 'Edit' to view and/or update.

Reservation Details

PERSIMMON Solicitor Admin System Logged in as: Karen Castle | Logout

Dashboard Account

Reservation - Mr Phillip Lock

Below are the reservation details and pre-defined key dates for Mr Phillip Lock. To mark an action as complete, please tick the box next to action. If you do not complete an action before the required date, it will be flagged in the system (see key at the bottom of page).

Please Note: You cannot add a date in the past. By default the system uses today's date, so it is essential that you update as soon as the action is completed.

Details Comments **1** + Add

Cancel / Back **Update / Save**

Date	Brand	Region	Development	Plot
31/01/2014	Persimmon Homes	Designamite 1	Designamite 1 Prospect	002

Development Contact:
designasite2@persimmonhomes.com

Personal Details

Mr Phillip Lock	Tel - Mobile	Address
phil.lock@persimmonhomes.com	07952931372	Persimmon Plc Persimmon House Fulford York North Yorkshire YO19 4FE United Kingdom

Customer Situation
House to Sell

Investor
No

Tel - Day/Work
Missing

Tel - Evening/Home
Missing

Plot Details

Address	Estimated Build Date	Release Price	Purchase Price
Freehold	N/A	£0	£175,000
Ground Rent	House Type	House Type Name	Gross Area (sq ft)
N/A	N/A	N/A	TBC
Build Stage at Reservation	Parking Spaces	Garage	Garage Tenure
N/A	1	None	N/A
Service Charge	Garage Ground Rent	Garage Service Charge	
N/A	N/A	N/A	N/A

When you 'View' a reservation you will see something similar to the screenshot above.

- 1** Click the green '+Add' tab to add a Comment to the customer's record. This comment will be seen by the Sales Advisor at the relevant development.
- 2** Customer Reservation Details & Site contact information.
- 3** Plot information including purchase price and incentives if applicable.

Reservations - Key Dates

Investor
No

Tel - Evening/Home
Missing

North Yorkshire
YO19 4FE
United Kingdom

Plot Details

Address	Estimated Build Date	Release Price	Purchase Price
Tenure	N/A	£0	£175,000
Freehold			
Ground Rent	House Type	House Type Name	Gross Area (sq ft)
N/A	N/A	N/A	TBC
Build Stage at Reservation	Parking Spaces	Garage	Garage Tenure
N/A	1	None	N/A
Service Charge	Garage Ground Rent	Garage Service Charge	
N/A	N/A	N/A	N/A
Promo Code	Incentives		

1 Key Dates

Solicitor instructed (formally) 31/01/2014	Enquiries raised Select
Contract papers issued 09/02/2014	ID received Select
Contract papers received 11/02/2014	Contract signed 26/03/2014
Mortgage instructions received 21/02/2014	Deposit paid 28/03/2014
Lender incentive approval 06/03/2014	Contract exchanged 02/04/2014
All searches applied for 08/03/2014	Legal completion dd/mm/yyyy
Search received 15/03/2014	

3 Key 1 - 7 days overdue > 7 days overdue

4 Cancel / Back Update / Save

Scroll down to view Key Dates.

- 1** Key Dates – as predefined by Persimmon. You are required to enter the Key Dates for each completed stage. These dates are linked to the Sales Advisors Dashboard and Plot Overview page as part of the overall Sales Progress procedure.
- 2** Tick the box against each step to mark as complete. Sales Advisors will be notified of updates.
- 3** Key - Orange means the task is 1-7 days overdue, Red 7+ days.
- 4** Select 'Update/Save' to record any changes.

Reservations - Help to Buy

Address
40 Grouse Road
Old Sarum
Salisbury
SP4 6GE

Estimated Build Date
20/04/2012

Parking Spaces
1

House Type
3 Bed Semi Detached House

Tenure
Freehold

Promo Code

Release Price
£239,995

Build Stage at Reservation
Not started

Garage
Single

Purchase Price
£235,000

Incentives
Stamp Duty Paid
Flooring carpets and vinyl

Garage Tenure
Freehold

Key Dates

Solicitor instructed (formally)
20/01/2014

Contract papers issued
29/01/2014

Contract papers received
31/01/2014

Mortgage instructions received
10/02/2014

Lender incentive approval
23/02/2014

All searches applied for
25/02/2014

Search received
04/03/2014

Enquiries raised
Select

ID received
Select

Contract signed
15/03/2014

Deposit paid
17/03/2014

Contract exchanged
22/03/2014

Legal completion
dd/mm/yyyy

1 Help to Buy

Solicitor one form
06/02/2014

Authority to exchange (ATE)
15/03/2014

Authority to complete (ATC)
18/06/2014

Key 1 - 7 days overdue > 7 days overdue

Cancel / Back **Update / Save** **2**

1 If the customer is buying with Help to Buy there are 3 additional Key Dates for you to complete.

2 Select 'Update/Save' to record any changes.

Sales Advisor Dashboard (for reference only)

Sales Progress

Shown below is an average percentage of completion for all active reservations.

- Sales Stage - 7%**
An average of 7% complete. Average of 5 days overdue per plot.
- Broker Stage - 7%**
An average of 7% complete. Average of 15 days overdue per plot.
- 1 Legal Stage - 3%**
An average of 3% complete. Average of 12 days overdue per plot.

Plots | Receipts

Plot: Payment Confirmation:

Completion Due From: Completion Due To:

Plot Status: ☒ Reserved ☐ Completed

Sales Scheme: ☒ None ☒ Help to Buy ☒ NewBuy ☒ Shared Equity ☒ PX ☒ Home Change

Search Results

Your search returned 11 results.

Show: 10 1 - 10 of 11 results

2

Plot	Status	Prospect	Sales % Complete / Next	Broker % Complete / Next	Legal % Complete / Next	Receipt
097	Reserved	Mr SYMINGTON	50%	0%	0%	Awaiting Send View
106	Reserved	Mrs Mercer	30%	0%	25%	Awaiting Send View
110	Reserved	Mr Ray	0%	0%	0%	Awaiting Send View

Sales Advisors have a traffic light system to instantly see the status of each reservation.

- 1** Performance Overview - Linked to your Key Dates - the dark grey bar is where the Solicitor status should be (please note this is an average across all reservations for that site, not necessarily yours).
- 2** Plot specific - Sales Advisors can quickly identify issues. The dark grey bar is where you should be on any given plot, and the coloured % bar above is where you are. Green on target, Orange 1-7 days overdue, Red 7+ days overdue.

Your Comments (for reference only)

The screenshot shows the 'Edit prospect' page in the Persimmon Sales Admin System. The browser address bar shows the URL: <https://crm.persimmonhomes.com/Prospects/edit/4062282>. The user is logged in as Karen Castle.

The main navigation tabs are: Dashboard, Calendar, Prospects, Reports, Sales Progress, and Admin. The 'Prospect' section is active, showing tabs for Main Details, History, Prospect Comments (0), and Sales Progress (1).

Personal Details:

- Hot lead (click to turn on)
- Unique Customer Reference: K716E4420B1-10
- Lead

Contact Information:

- Title: Mr
- First Name: Pablo
- Surname: Castle
- Email: paul@kungfulounge.net
- Postcode: EX6 7HS
- Look Up

Telephone Contact Methods:

- Tel - Mobile: Enter mobile number
- Tel - Other/Day: 0123456789
- Tel - Evening: Enter evening telephone number

Prospect Status:

- Persimmon:** Reserved (15/01/2014), Designamite 1, Designamite Persimmon, Plot 121A
- Charles Church:** Removed (13/03/2012)

Follow Ups & Appointments: + Add

Comments:

- Comments
- Broker
- Solicitor** (marked with a red circle and '1')

Comments List:

- Persimmon Homes, Designamite 1, Designamite
- Added by Karen Castle, Designamite Ltd. on 21/01/2014
- Customer informed that searches have been delayed

Your comments are captured in the 'Comments' section of the customer details for the Sales Advisor to see. This is an example of how it looks.

- 1 Solicitor Comments field.